

MASSACHUSETTS

Workforce Investment Act

STEERING COMMITTEE

WIA Communication No. 00-11

☒ **Policy**

☐ **Information**

To: Chief Elected Officials
Regional Employment Board Chairs
Regional Employment Board Directors

cc: WIA State Partners
Service Delivery Area Directors or Designee
Career Center Directors
DET Regional Directors
DET Area Directors

From: Department of Labor and Workforce Development

Date: March 14, 2000

Subject: Local Planning Instructions

Purpose: The purpose of this policy is to provide instructions to the Local Workforce Investment Board (LWIB) on the preparation and submission of a Five-Year Plan for the workforce development system including the operation of the One-Stop Career Center service delivery system.

Background: These are the instructions for the Five-Year Local Plan narrative and forms. Additional instructions for the Local Partner MOUs will be mailed under separate cover. The planning package to be submitted to the state on June 1 must include the Five-Year Local Plan and the Local Partner MOUs.

Policy: The Local Workforce Investment Board is responsible for preparing and submitting a Five-Year Local Plan and Local Partner MOUs to the state by June 1 in accordance with

- Local Planning Instructions provided herein,
- WIA Communication No. 00-03: Provision of Core Services
- WIA Communication No. 00-04: Memoranda of Understanding (MOU)
- Local Partner MOU Instructions (forthcoming)
- Related State Policies (forthcoming)

Action

Required: Review this document and provide copies of it to individuals who will be responsible for preparing the Five-Year Local Plan and the Local Partner MOUs.

Note: Please bring your copy of the planning instructions with you if you are attending the Planning Conference on March 22. The planning instructions will also be posted on the Massachusetts WIA Implementation web site at www.Massworkforce.org.

Effective: Immediately.

References: Sections 101-507, Workforce Investment Act of 1998, Public Law 105-220
Sections 660-100 to 660-440, WIA Interim Final Rule (20 CFR 652, et al)

Inquiries: Any questions related to this correspondence should be directed to Kim McLaughlin (ext. 104) at (617) 727-6573.

Filing: Please file this in your notebook of previously issued WIA Communication Series Issuances as 00-11.

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WORKFORCE INVESTMENT ACT

Planning Schedule

Dec. 1, 1999	DLWD notifies CEOs of requirements for area and CEO designation
Dec. 28	The Commonwealth's WIA Youth Plan submitted to US DOL
Jan. 3, 2000	Local area designations and CEO selections due
Feb. 15	CEO Briefing convened by DLWD
Feb. 22	LWIB Certification packages sent to CEOs and REBs
March	<ul style="list-style-type: none"> • Five-Year Local Planning Instructions issued
March	<ul style="list-style-type: none"> • Local Partner MOU Instructions issued
March 22	Five-Year Local Planning Conference in Worcester
March 28	First State Workforce Investment Board (SWIB) meeting
April 1	Youth transition funds issued, transition period begins
April 1	CEOs submit LWIB membership list to state
May 1	LWIB Operating Budgets submitted to state
May 1-30	30 Day Public Comment Period on Five-Year Local Plans
By June 1	Five-Year Local Plans submitted by CEO & LWIBs to State
June 1-30	State Partners Review of Five-Year Local Plans
June	Statewide LWIB Meeting (details TBA)
By June 30	State Approvals of Local Plans sent to CEO & LWIBs
July 1	Workforce Investment Act becomes effective; FY 2001 starts; Implementation of Five-Year Local Plans begins
July 7	LWIB Certification Packages submitted to CBWL
Oct. 1	LWIB Certifications issued by CBWL

**Planning Package Checklist and Submission Instructions
for
Five-Year Local Plan
Workforce Investment Act**

Items provided in the planning instructions	Items to submit with Local Plan
Checklist (form) Cover Signature Sheet (example) Planning Questions Attachment A: LMI Attachment B: CEO Briefing	____ Completed Checklist ____ Signed Cover Sheet ____ Plan Narrative ____ Customer Flow Chart
Overall Performance Summary (form)	____ Overall Performance Summary
Integrated Budget Summary (form)	____ Integrated Budget Summary ____ Budget Narrative
Local Partner MOU Instructions (DET) Local Partner MOU Instructions (CBWL) Local Partner MOU Instructions* (to be provided by other state partners)	____ Local Partner MOUs* ____ Local Partner MOUs* ____ Local Partner MOUs*
	<p><i>*All Partner MOUs may not be available for inclusion in this package; please indicate which Partner MOUs are included in the package and which are pending.</i></p>

Submit a signed original and 6 copies of the plan to:

Rosemary Graham, Director
Policy, Planning and Program Administration
Corporation for Business, Work, and Learning
529 Main Street, Suite 110
Boston, MA 02129

Lisa Caissie will log the receipt of the packages and will distribute the copies to reviewers at DLWD, DET and CBWL.

**Workforce Investment Act
Fiscal Year 2001**

Five-Year Local Plan

Name of Local Area

Name of Workforce Investment Board

We submit this plan with knowledge and acceptance of our roles and responsibilities in workforce development system and for the One-Stop Career Center service delivery system as specified in Workforce Investment Act of 1998, in the Interim Final Rule.

Chief Elected Official

Chair, Workforce Investment Board

Signature

Date

Signature

Date

Printed name

Printed name

Title

Title

Organization

Organization

Address

Address

City, State, Zip

City, State, Zip

LOCAL PLANNING INSTRUCTIONS

INTRODUCTION

Since the Workforce Investment Act (WIA) was signed into law in August 1998, local leaders have joined with us at the state to lay the groundwork for WIA implementation on July 1, 2000. Among the most important tasks has been the establishment of the state workforce investment board, designating the local areas, developing local agreements and selection of the Chief Elected Officials (CEOs), and setting up the Local Workforce Investment Board (LWIB) certification process.

These and other WIA implementation tasks have been proceeding under the auspices of the WIA Steering Committee and its Subcommittees since the fall of 1998. A CEO Briefing hosted by Bell Atlantic and the Department of Labor and Workforce Development (DLWD) held on February 15, 2000 outlined the roles and responsibilities of the CEOs and the LWIBs in the sixteen local areas of Massachusetts. (See Attachment B: Excerpts from CEO Briefing) The LWIB Certification Process was mailed to local areas in WIA Communication No. 00-06 on February 22. The LWIB and CEOs will continue with board certification activities concurrent with the local planning activities.

In the planning questions LWIBs and CEOs will be asked to describe the local vision for an integrated workforce development system. It is not expected that all aspects of the vision will be fully realized by July 1, 2000. Part of the expectation for a five-year plan is that *development of the new system will be a dynamic process* over the five-year period. Local modifications to the five-year plan will be made, as needed, during the planning season of each year.

LWIBs, in partnership with the CEOs, will lead the planning process and should begin with consideration of the following:

- the workforce investment needs of employers and job seekers in your area;
- the abilities of and the challenges to local workforce development partners in meeting those needs - both as separate entities and as partners in the One-Stop Career Center(s);
- how your strategic leadership can enhance the efforts of the local partners in the establishment and continuous improvement of the One-Stop Career Center(s) delivery of services to employers and jobseekers; and
- how your area will integrate multiple workforce development efforts into a well coordinated and customer driven system.

One of the implementation challenges for Massachusetts in the Workforce Investment Act will be the expansion of the capacity and responsiveness of the youth and adult workforce development system *even though* federal funding for Massachusetts' workforce development system diminishes each year that our economy improves and the unemployment rate drops. With this in mind, there are four important opportunities/challenges that are addressed in the planning questions. The challenges are:

1. To pool resources among local partners to provide employers and jobseekers with one-stop universal access to basic workforce development services *while also* developing the individual partners' capacity to provide intensive and training services to targeted populations as mandated by the various funding streams. The roles of the local partners will be specified in the MOUs developed as part of this planning process.
2. To address the needs of unemployed and employed workers to secure or maintain employment that provides self-sufficiency.
3. To set priorities for the targeting of adult intensive and training services to recipients of public assistance and other low-income individuals.
4. To develop a Youth Council to inform and advise the board in the integration of multiple partners' youth resources into a continuum of comprehensive year-round youth activities and service providers.

It is realistic to succeed in these challenges only if, from the first year to the fifth year, stakeholders in the system come together in an atmosphere of cooperation and commitment to solve common problems and, increasingly, to gain common ground. The LWIBs are charged with providing the leadership in this effort.

Capacity Building and Technical Assistance

In the coming months and continuing through the next five years the U.S. Department of Labor, the Commonwealth's Department of Labor and Workforce Development, the state workforce investment board (SWIB), the statewide LWIB Association and state partners will provide technical assistance and support in the following areas:

- Capacity building of the LWIBs and their Youth Councils, including
 - Strategic planning tools and technical assistance resources
 - Negotiation of MOUs
- Performance and program management
- Administrative and fiscal management

The statewide LWIB Association will convene the **Statewide LWIB Meeting in June, 2000** which all LWIB Members are asked to attend. Additional information about this and other technical assistance offerings will be provided at the Local Planning Conference on March 22.

In conclusion, as you undertake the planning process and the description of your area's vision for the workforce development system, you should incorporate the goals and principles outlined in the WIA Vision Statement issued in WIA Communication No. 99-04 on August 10, 1999.

Vision Statement

- All Massachusetts residents will have the competencies, employment skills and education to support themselves and their families and to live a quality life.
- Massachusetts' employers will have access to the skilled and educated workforce necessary to remain competitive in a dynamic global economy.

To achieve these overarching goals the state is committed to a workforce investment system built on the following principles:

- a) The workforce investment system will be built on and guided by a genuine partnership between the public and private sectors and between state and local stakeholders.
- b) A common strategic vision will guide the workforce investment system. This vision will be translated by each partner into concrete goals that complement the goals of all other partners.
- c) The workforce investment system will be responsive to its customers and provide them with the opportunity to make informed choices.
- d) The workforce investment system will focus on those skills that improve workers' employability and earnings in the marketplace.
- e) Programs and services will be developed based on a continuing assessment of firms' needs and workers' skills.
- f) The workforce investment system will provide a coordinated progression of services that is easily understood by and accessible to the Massachusetts workforce and employers.
- g) The workforce investment system will encourage the pursuit of education and lifelong learning in order to enhance earnings and improve workers' employability, productivity and competitiveness in the changing global economy.
- h) The workforce investment system will be run efficiently. Customers will have access to a range of services that can accommodate those most job ready, and intensive services will be reserved for those most at risk of suffering unemployment, serious income loss, and/or poverty.
- i) The workforce investment system will be accountable to its customers and for continuous quality improvement.

LOCAL PLANNING QUESTIONS

A. Local Labor Market Analysis

In order to ensure that the services provided under the Workforce Investment Act address relevant labor force and employer needs, an analysis of local labor market conditions is a critical component of the local planning process. An understanding of the key economic trends that shape the local labor market environment should assist local planners and program operators in developing an appropriate mix of employment and training services. Such services should support strategies designed to promote local economic growth and development.

The local labor market analysis should include at a minimum:

- An analysis of current industry employment trends, with an emphasis on identifying major growth industries.
- An identification of projected industry and occupational employment opportunities.
- A description of the job skills and training requirements necessary for employment in targeted industries and occupations.
- An assessment of current labor force trends.
- An analysis of the education and training needs of individuals in your labor market area.

See Attachment A for a summary of labor market information that has been distributed by the Economic Analysis unit of DET.

The use of additional sources of information, including results from Employer surveys, local advisory groups, special reports and any other sources of relevant local labor market information, is encouraged.

B. One-Stop Delivery System

1. Describe the vision of the Chief Elected Official (CEO) and the local workforce investment board (LWIB) for an integrated service delivery system, including the role of each program partner in the delivery of services through the system.
2. Please identify all current and anticipated partners in your One-Stop Career Center(s).
3. How will the services provided by each of the mandatory and affiliate One-Stop partners be coordinated and made available through the One-Stop system? Please explain how access to the core services of all required partners will be available through at least one comprehensive One-Stop Career Center in your region.

4. Please describe the core services to be provided at the One-Stop Career Center(s), including
 - the informational, self-help, and facilitated self-help services that will be provided to universal access jobseekers, and
 - the staff-assisted services that will be provided to job seekers who are enrolled and eligible for a local partner's targeted services.
5. How do you plan to provide universal access to services, for employers and jobseekers, within the constraints of categorical funding streams?
6. Describe the initial procedures to be utilized to ensure that the needs of all customers, including employers and job seekers, are correctly identified and efficiently referred to appropriate services.
7. Provide a customer flow chart and narrative for both employers and job seekers describing how service needs will be determined and delivered.
8. Please describe how you will coordinate services available through the OSCC with other workforce development, educational and youth programs within the region to maximize resources.
9. What services will you provide for youth at the One-Stop Career Center(s). If services are to be provided elsewhere please indicate where and how these services will be linked to the region's workforce development system?
10. Please discuss the customer feedback mechanisms to be utilized to measure customer satisfaction for employers and job seekers.
11. Please describe your plans to ensure continuous quality improvement in the delivery of services to customers. Describe the activities planned to achieve these goals such as capacity building, organizational development, staff training, team building, infrastructure changes.

12. Please describe how an integrated management structure will be accomplished in your One-Stop Career Center system.
13. Please provide the following information for the One-Stop Career Center(s) in your region:
 - a. Location
 - b. Satellites
 - c. Accessibility to public transportation
 - d. Availability of parking
 - e. Square footage
 - f. Planned hours of operation and rationale
14. Provide a list of your technology and equipment resources. Identify equipment to be used by solely staff (if any), and equipment that customers may access via self-help or facilitated self-help including telephones, computers, printers, electronic job listings, and internet access.
15. Provide a list of technological and equipment needs for the future.

C. Training Strategy

Discuss your overall training strategy for youth, adults and dislocated workers and how it relates to your analysis of the type of education and training appropriate for your labor market area (analysis provided in the labor market section of this plan). The information provided here should correspond to specific training plans outlined in local partner MOUs. Include, as applicable, discussion of the following types of education and training services:

- occupational skills training
- school-to-work programs
- entrepreneurial training
- on-the-job training
- employed worker training
- skills upgrading and retraining
- job readiness training
- adult education and literacy activities
- customized training

D. Youth Activities

1. How will your youth program and its activities be connected to the One-Stop delivery system, including which youth services, if any, will be provided through the One-Stop Career Center?

2. Describe how your service delivery design will assure that Title I Youth Activities are provided not as a stand alone activity, but as part of an array of services available in the local area including, for example, school-to-work, local education providers, Job Corps, CBOs, juvenile justice programs. Please include
 - referrals and coordination with appropriate service, training and education programs that have the capacity to serve Title I Youth either on a sequential or concurrent basis to Title I Youth Activities;
 - referrals and coordination with appropriate service, training and education programs that have the capacity to serve youth who are not eligible for, or otherwise cannot be served in, Title I Youth Activities.
3. Provide a brief description of the work tasks that your Youth Council will undertake during the coming year. Such tasks could include, for example:
 - an analysis of the education and workforce needs within your youth population, organized by eligibility criteria or employment barrier;
 - a ‘map’ of available federal, state, local, and private programs and resources available in your local area to support youth development;
 - a description and assessment of the type and availability of youth development services available in your local area, together with an identification of service gaps;
 - development of coordinated strategic planning across youth development resources (*i.e.*, beyond Title I WIA funds); and
 - a process for identifying successful providers of local youth activities, and a process for encouraging program improvement by local youth service providers.

E. Overall Performance Goals

One of the responsibilities of the LWIB under WIA is to establish overall performance goals for the one-stop service delivery system and to negotiate categorical performance goals to be included in the Local Partner MOUs. Additional guidance on the federal and state requirements for local partner performance measures will be provided during the planning process. The overall performance goals should be prepared after the partner performance goals are negotiated and should be a summary of the negotiated goals.

Please complete the attached chart and provide a narrative description of the **Overall**

Performance Goals for the one-stop service delivery system including:

- Number of jobseekers using the one-stop system;
- Number of employers using the one-stop system;
- Number of jobseekers entering employment; and
- Number of one-stop system users entering training.

These system-wide goals should include the universe of system users whose interface with the local one-stop system will be reflected in the data collected by the statewide Massachusetts One-Stop Employment System (MOSES). In some instances these totals may be the same as performance levels planned for specific funding streams and reflected in attached MOUs. The description should also indicate whether all One-Stop customers will be registered as Wagner-Peyser service customers. If not, the LWIB should describe how, and on what basis a customer will be registered in Wagner-Peyser, Title I, and/or other partner program services.

F. Integrated Budget Summary

1. Please submit an Integrated Budget Summary of the contributed costs (revenue or value) from local partners toward the operation of the One-Stop Career Center. To ensure consistency across all areas, please use the attached budget format. Add columns as needed for additional partners.
2. Provide a budget narrative that includes a description of the costs included in each line item. Individual partner contributions reflected in the Integrated Budget Summary should correspond to the individual partner budgets contained in the MOUs.

G. Public Comment Period

Please describe the process to be used by the LWIB to provide opportunity for public comment over a minimum 30-day period, including comment by representatives of business and labor organizations, and input into the development of the local plan, prior to the submission of the plan to the Commonwealth. The LWIB must submit any comments that express disagreement with the plan to the Commonwealth along with the plan. § 661.345(b) and (c)

H. Fiscal Agent(s)

Identify the local fiscal agent(s) responsible for the disbursement of funds received by grant or allocation, i.e. Title I, Wagner Peyser and others as appropriate. For each fiscal agent, include the following information:

- Funds type
- Contact Person
- Agency Name
- Street Address
- City, State, Zip Code
- Telephone
- Fax
- Email

(Name of LWIB)
FY 2001 Workforce Investment Act
Overall Performance Goals

Date submitted:

		1.	2.	3.	4.	5.	6.	7.	8.
		Total # of universal access customers	Total # to be entered on MOSES system	Total # registered for Wagner Peyser	Total # registered in Title I	Total # registered in WTW	Total # enrolled in (other Local Partner services)	Total # enrolled in (other Local Partner services)	Total # enrolled in (other Local Partner services)
A.	Total # of jobseekers served (age 18 and older)								
B.	Total # Youth Enrolled (age 14-21)								
C.	# of jobseekers entering training or education activities								
D.	# of jobseekers placed in full time unsubsidized employment								
E.	# of employers served								
F.	# of job openings received								
G.	# of job openings filled								

Use additional rows/columns as needed to reflect other local partner services.

(Name of LWIB)

Integrated Budget Summary - FY 2001
Contributed Revenue or Value from Partners

	DET (Partner/Funding Agency)				CBWL (Partner/ Funding Agency)				Additional Partners		TOTAL
	Wagner Peyser	U.I.	VETS	Other	Title I Adults	Title I Dis. Wrkrs	Title I Youth	WTW	Fund Type	Fund Type	
1. LWIB Activities											0
2. FA Activities											0
3. OS Activities											0
Personnel											0
NPS											0
Facilities											0
ITAs											0
Training											0
Sup. Svcs											0
Other											0
OS Subtotal											0
Total Budget	0	0	0	0	0	0	0	0	0	0	0

Explanation of Categories

- 1. LWIB Activities - Funds to be retained to support the activities/expenses of the Local Workforce Investment Board.
- 2. FA Activities - Funds to be retained to support the activities/expenses of the WIA Fiscal Agent.
- 3. OS Activities
 - Personnel - Funds to be utilized to support salaries, fringe and related costs of personnel providing services through the OS delivery system.
 - NPS - Funds to be utilized to support one-stop delivery system non-personnel costs, not including facilities or subcontracts.
 - Facilities - Funds to be utilized to support the one-stop delivery system facilities costs.
 - ITAs - Funds to be utilized to provide Individual Training Account to one-stop delivery system participants.
 - Other Training - Funds to be utilized to provide customized or group training programs to one-stop delivery system youth and/or adults .
 - Support Services - Funds to be utilized to provide support services, incentives and/or other payments to one-stop delivery system participants.
 - Other - Funds to be utilized to provide other one-stop delivery system activities.
- OS Subtotal - Subtotal of one-stop delivery system costs.
- Total Budget** - Total of LWIB, FA, and OS Subtotal.
The budget totals shown here should be equal to the fund type allocations to the local area.

Add additional columns/rows as needed to reflect additional partners/fund types. Extend the page size as needed.

**ATTACHMENT A:
Labor Market Information Resources**

FY2001 LMI Planning Package Data distributed to REBs by DET

One package of area-specific labor market information has been provided for each REB through a series of Labor Market Information sessions hosted by the Economic Analysis unit of DET. This attachment contains a description of the data sets provided and a chart of the data sets, distribution timeframes, and data availability.

Annual average ES-202 data by 2-digit SIC code for SDAs for 1997 and 1998: This data provides employment by industry in establishments covered by the unemployment insurance laws. (1998 is the latest full year available from this source.)

Selected 3-digit ES-202 data by SDA for the same two years: This data breaks out some of the larger industries into finer detail. For example, Engineering and Management Services (SIC 87) is a 2-digit SIC code industry; Research and Testing Services (SIC 873) and Management and Public Relations (SIC 874) are two of the 3-digit industries included within the 2-digit Engineering and Management Services group.

Quarterly ES-202 data by 2-digit SIC code for SDAs for the second quarters of 1998 and 1999: (The second quarter of 1999 is the latest quarterly data available from this data source.) Since the ES-202 data is not seasonally adjusted, it is important that comparisons always be made between the same quarters of different years.

Selected 3-digit ES-202 data by SDA for the same two quarters

The Massachusetts Job Outlook Through 2006: This DET publication identifies the fastest growing industries and occupations in the state and highlights future training needs.

Employment Projections for Industries and Occupations, 1996-2006 (State): This publication provides detailed statewide projections for more than 100 industries and 400 occupations.

Regional Occupational Employment Projections: This set of new publications provides occupational projections from 1996 to 2006 for five regions within Massachusetts – West, Central, Northeast, Southeast and Greater Boston.

ATTACHMENT A: continued
Labor Market Information Resources

FY2001 LMI Planning Package Data distributed to REBs by DET

Labor Force and Jobs Tables for the Major City in the SDA: These tables provide historical data on labor force, employment and unemployment of residents as well as UI-covered jobs by place of work for the major city in the SDA.

Regional Fact Sheets: These monthly publications bring together employment and unemployment statistics for each of four regions within Massachusetts – West-Central, Northeast, Southeast and Greater Boston.

Massachusetts Occupational Wage Statistics: This publication provides statewide mean and median annual (for professional and managerial occupations) or hourly (for all other occupations) wages from the 1997 wage survey (the latest available at this time).

Massachusetts Occupational Wage Statistics by Service Delivery Areas: This is a companion to the preceding publication and provides similar data for each of the 16 SDAs.

Claimant Characteristics by SDA: This set of tables provides detailed information about claimants for unemployment insurance by SDA for the latest month. The data includes race, ethnicity, gender, age, educational attainment, prior earnings, occupation and industry for claimants.

Labor Market Information Report - Associate's Degree: This recently-updated report highlights jobs requiring an associate's degree or other post-secondary education, but less than a bachelor's degree. The report provides information about the number of current jobs, new jobs through 2006, replacement jobs, growth rate, and annual salaries for the selected occupations requiring this level of education.

Labor Market Information Report – Entry Level: Another recently-revised report, this one highlights jobs that require little or no advance training and can be learned with a few days or weeks of on-the-job training. The type of information provided about each occupation is similar to that in the immediately preceding report.

ATTACHMENT A: continued
Labor Market Information Resources

FY2001 LMI Planning Package Data distributed to REBs by DET

Product	# of Reports	Available By:	Hard Copy	Diskette	Internet
2-digit ES-202 Employment by SDA 1997&1998	16	02/02/2000	*	*	
Selected 3-digit ES-202 Employment by SDA 1997&1998	16	Feb-00	*	*	
2-digit ES-202 Employment by SDA 1998-2&1999-2	16	Feb-00	*	*	
Selected 3-digit ES-202 Employment by SDA 1998-2&1999-2	16	Feb-00	*	*	
The Massachusetts Job Outlook Through 2006	1	02/02/2000	*		*
Employment Projections – State	1	02/02/2000	*		*
Regional Occupational Employment Projections	5	02/02/2000	*		*
Labor Force and Jobs Tables for Major Cities in SDAs	16	02/02/2000	*		?
Regional Fact Sheets	4	02/02/2000	*		?
Occupational Wage Statistics – State	1	02/02/2000	*		*
Occupational Wage Statistics by SDA	1	02/02/2000	*		*
Claimant Characteristics by SDA	1	02/02/2000	*		?
Associates Degree Report	1	02/02/2000	*		*
Entry Level Report	1	02/02/2000	*		*

Notes

- * indicates that information is available in this format
- blank** indicates information is not available in this format
- ? indicates that information is not yet available in this format

Access to DET's labor market information is available at: <http://www.detma.org>

ATTACHMENT B:

**Excerpts from the CEO Briefing
February 15, 2000**

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CHIEF ELECTED OFFICIAL BRIEFING

February 15, 2000
11:45 A.M. – 2:00 P.M.
Le Meridien Hotel

Agenda

Welcome from Host Bell Atlantic

Robert Mudge, *Vice President, Bell Atlantic of Massachusetts*

Lunch

Opening Remarks and Meeting Agenda

Janice Tatarka, *Chief of Staff, Massachusetts Department of Labor and Workforce Development*

The State Vision for a Workforce Development System

Senator Henri Rauschenbach

Message from United States Department of Labor Secretary Alexis Herman

James Farmer, *Secretary's Representative, USDOL*

The Federal Perspective

Robert Semler, *Regional Administrator, ETA, USDOL*

WIA Overview

Janice Tatarka, *Chief of Staff, DLWD*

- CEO Roles and Responsibilities
- Timeline for Action

Local Workforce Investment Boards (LWIB) and Youth Councils

Leonard Wilson, *Chairman, Massachusetts Regional Employment Board Association*

- LWIB Roles and Responsibilities
- Timeline for Action

CEO and LWIB Comments and Recommendations - Discussion

STATE AGENCY CONTACTS

Department of Labor and Workforce Development

One Ashburton Place, Suite 2112

Boston, MA 02108

(617) 727-6573

Angelo Buonopane, Director

- Governor's WIA liaison
- WIA Grant Recipient
- Federal Welfare-to-Work Grant Recipient
- Oversight agency for Division of Employment and Training, and Corporation for Business, Work, and Learning

Corporation for Business, Work, and Learning

Jonathan Raymond, President

(617) 727-8158 www.cbwl.org

- Workforce Investment Act (WIA Title I) Administrator
- Federal Welfare to Work Administrator
- Trade Adjustment Assistance Act
- Youth Programs

Division of Employment and Training

Jack King, Deputy Director

(617) 626-6600 www.det.ma.org

- Employment Services
- Unemployment Insurance
- Veterans Employment Services
- Migrant and Seasonal Farm Workers in conjunction with the New England Farm Worker Council

Executive Office of Health and Human Services

William D. O'Leary, Secretary of the Executive Office of Health and Human Services

(617) 727-7600 www.state.ma.us/eohhs

- Oversight of all education and training services of the EOHHS including:
 - Department of Transitional Assistance
 - Department of Social Services
 - Department of Youth Services
 - Department of Mental Health
 - Department of Mental Retardation
 - Massachusetts Rehabilitation Commission
 - Massachusetts Commission for the Blind

Department of Education

David Driscoll, Commissioner

(781) 338-3300 www.doe.mass.edu

- Adult Education and Literacy
- Secondary Vocational Education (Carl D. Perkins Act)
- Postsecondary Vocational Education (Carl D. Perkins Act)

Massachusetts Rehabilitation Commission

Elmer Bartels, Commissioner

(617) 204-3600 www.state.ma.us/mrc

- Title I of the Vocational Rehabilitation Act

Department of Elder Affairs

Lillian Glickman, Secretary of the Executive Office of Elder Affairs

(617) 727-7750 www.stae.ma.us/elder

- Title V of the Older Americans Act

Department of Housing and Community Development

Jane Gumble, Director

(617) 727-7765 www.state.ma.us/dhcd

- Department of Housing and Urban Development
- Employment and Training Activities
- Community Services Block Grant Program

State Workforce Investment Board Functions

The State Board shall assist the Governor in the:

1. Development of the State plan.
2. Development and continuous improvement of a statewide workforce investment system, including:
 - (a) Development of linkages in order to assure coordination and nonduplication among the programs and;
 - (b) Review of local plans
3. Commenting at least once annually on the measures taken under the Carl D. Perkins Vocational and Applied Technology Education Act.
4. Designation of local areas.
5. Development of allocation formulas for the distribution of funds for adult employment and training activities and youth activities.
6. Development and continuous improvement of comprehensive State performance measures.
7. Preparation of the annual report, (made by the State), to the Secretary of Labor.
8. 8. Development of the statewide employment statistics system.

Chief Elected Official Functions

- A. Serve as grant recipient and fiscally liable party for grant funds under WIA Title I adult, dislocated worker and youth programs.
- B. Enter into an agreement with other chief elected officials in the region specifying the respective roles of the chief elected officials, in accordance with information provided by the State.
- C. Make appointments to the Local Workforce Investment Board in accordance with State criteria established under WIA.
- D. Enter into an agreement with the Local Workforce Investment Board establishing the governance responsibilities of the parties under the Workforce Investment Act.
- E. Ensure that partnerships are functioning effectively.

In Partnership with the Local Workforce Investment Board

The following are duties that the WIB undertakes with the approval of the CEO:

- Develop a budget for the purpose of carrying out the duties of the local board.
- Appoint Youth Council as a subgroup of the board.
- Develop 5 year Local Plan for the workforce development area.
- Select and certify One-Stop operators and providers.
- Identification of eligible providers of youth and adult services.
- Agree on Memoranda of Understanding between the board and the One-Stop partners.
- Negotiate and reach agreement on performance measurement levels and any additional local measures.
- Conduct oversight with respect to local programs of youth activities, local employment and training activities, and the one-stop delivery system in the local area.
- Coordinate the workforce investment activities carried out in the local area with economic development strategies and develop other employer linkages with such activities.
- Promote the participation of private sector employers in the statewide workforce investment system and ensure the effective provision, through the system, of connecting, brokering, and coaching activities, through intermediaries such as the one-stop operator in the local area or through other organizations, to assist such employers in meeting hiring needs.

Local Workforce Investment Board Functions

There shall be established in each local area of the state and certified by the Governor, a local Workforce Investment Board, to set policy for that portion of the statewide workforce investment system within the local area.

The functions of the local board include the following, which are to be carried out in partnership with the Chief Elected Official:

- Develop a budget for the purpose of carrying out the duties of the local board.
- Appoint Youth Council as a subgroup of the board.
- Develop 5 year Local Plan for the workforce development area.
- Select and certify One-Stop operators and providers.
- Identification of eligible providers of youth and adult services.
- Agree on Memoranda of Understanding between the board and the One-Stop partners.
- Negotiate and reach agreement on performance measurement levels and any additional local measures.
- Conduct oversight with respect to local programs of youth activities, local employment and training activities, and the one-stop delivery system in the local area.
- Coordinate the workforce investment activities carried out in the local area with economic development strategies and develop other employer linkages with such activities.
- Promote the participation of private sector employers in the statewide workforce investment system and ensure the effective provision, through the system, of connecting, brokering, and coaching activities, through intermediaries such as the one-stop operator in the local area or through other organizations, to assist such employers in meeting hiring needs.

The Youth Council Functions

The Youth Council is a subgroup of the Local Workforce Investment Board. The local board in cooperation with the Chief Elected Official appoints members of the Youth Council. The membership of the Youth Councils must include educators, employers, human service agency representatives, juvenile justice and law enforcement agencies, public housing authorities, parents and former participants of youth service programs.

The Youth Council carries out the following activities subject to the approval of the Local Workforce Investment Board:

- Develops youth portions of the five-year plan for the area;
- Recommends eligible youth providers;
- Provides oversight of eligible youth program provider;
- Coordinates youth activities in the local area; and
- Performs other duties as determined by the Chair of the LWIB.

Implementation timetable – In order to access youth funds under WIA, making them available on April 1, 2000, (earlier than the balance of WIA funds), the Commonwealth submitted a plan for Youth Activities to the United States Department of Labor on December 28, 1999. These funds will allow local areas to program appropriate summer employment programs for the summer of 2000. The LWIB and Youth Council for an area must be appointed and certified in order to begin administering these “transition” youth funds.

One-Stop Career Center System

The Workforce Investment Act requires the establishment of One-Stop Career Centers in each local area. Currently there are 37 One-Stop Career Centers operating across the state.

These One-Stop Career Centers will be administered by the various state partners who receive funding for workforce development programs in the Commonwealth. These partners consist of representatives from DLWD, the Division of Employment and Training (DET), the Corporation for Business, Work, and Learning (CBWL), the Department of Transitional Assistance (DTA), the Mass Rehab Commission (MRC), the Department of Education (DOE) and various representatives from the local areas. In some areas, there are other partners such as a Community College, non-profit entities and for profit companies.

The Workforce Investment Act mandates that a set of “core services” be provided to all who seek them through the One-Stop Career Center system. Core services fall into two categories. First, they are the primarily self-directed labor exchange services that provide information about employment opportunities and the labor market. Second, they are the more staff-assisted gateway services that identify career center customers who require more than basic labor exchange information and enable them to move further into the system to receive intensive and training services.

Job seekers and employers alike will be able to access the following services and information through their local One-Stop Career Center:

- Orientation to the various programs and services in the One-Stop system;
- Determination of eligibility for special programs;
- Initial assessment of skill levels, aptitudes, and abilities;
- Job search and placement assistance;
- Career counseling;
- Labor market information;
- A pool of qualified workers;
- Referral to other local services and agencies for supportive services;
- Assistance in filing claims for Unemployment Insurance.

The Workforce Investment Act: Required Partners

- **WIA Title I programs serving adults and dislocated workers**
- **Rapid Response activities**
- **Trade Adjustment and NAFTA TAA**
- **Employment Service and all Wagner Peyser activities**
- **Unemployment Insurance Programs**
- **Veterans Employment and Training**
- **Vocational Rehabilitation Services**
- **U.S Housing and Urban Development**
- **Community Services and youth programs funded through WIA**
- **Adult Education and Literacy**
- **Older Workers (Title V of the Older Americans Act)**
- **Federal Welfare-to-Work**
- **Job Corps**

